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ABSTRACT

Drawing on a current study, funded by the British Library Research and Innovation Centre, the context of higher education libraries is discussed, including funding and costs and recent major official reports on education and libraries. Future trends and imperatives are outlined. Models of library purchasing consortia are presented. The operation of the Southern Universities Purchasing Consortium's Libraries Project Group (United Kingdom) is examined in detail, including the serials agreement and the monographs and standing orders agreement. The lessons and benefits of consortium membership are discussed. The future influence of purchasing consortia, particularly on the regional library and on electronic publishing are examined. (Contains 17 endnotes.) (Author/MES)

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LIBRARY PURCHASING CONSORTIA: ACHIEVING VALUE FOR MONEY AND SHAPING THE EMERGING ELECTRONIC MARKETPLACE

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Abstract

Drawing on a current study, funded by the British Library Research and Innovation Centre, the context of higher education libraries is discussed, including funding and costs and recent major official reports on education and libraries. Future trends and imperatives are outlined. Models of library purchasing consortia are presented. The operation of the Southern Universities Purchasing Consortium's Libraries Project Group is examined in detail. The lessons and benefits of consortium membership are discussed. The future influence of purchasing consortia, particularly on the regional library and on electronic publishing are examined.

1. Context

1.1 General

The library market in the UK is rich and active. The four sectors that are the subject of our current study, funded by the British Library Research and Innovation Centre, have some fairly well established statistical series. These demonstrate the following spend for 1995/61:

	Books (£000s)	Serials (£000s)	Total (£000s)
Further education*	12,056	4,110	16,166
Health Service**	3,299	5,717	9,016
Higher education	41,000	60,000	101,000
Public libraries	110,000	7,000	117,000
Total	166,355	76,827	243,182

* 1994/5

** Budget, not expenditure

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1.2 Higher education library trends

These bald statistics do however mask some worrying trends, familiar to many of us. They are well illustrated for higher education institutions (HEIs) by the historical summaries for the period 1985/6-1995/6 provided in the LISU Annual Library Statistics 19972. (There are unfortunately two sets of statistics, one for "old" universities, one for "new", compiled for historical reasons on rather different bases).

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Taking first the "old" university libraries, the most striking factor is the rise over the period in student numbers from 333,000 to 705,000. This rise is accompanied by a (smaller) rise in the number of academic and academically related staff, from 47,000 to 79,000. The number of full-time equivalent professional library staff also shows a significant increase, from 1361 to 1977, but post-1994 data represent a differing sequence from previous years due to provision of composite statistics drawn from HESA and SCONUL. Taken together, these figures show a rise in the user population of 106%. The ratio of users (students and staff) to each member of professional staff, even using the enhanced figures above, shows a corresponding rise of 42%, from 279 to 396.

Absolute expenditure shows some significant rises, particularly for periodicals, from £16.9m to £39.3m. However, if adjusted to take account of inflation and the rise in student numbers, the figures paint a very different picture. Total real library expenditure per capita shows a fall of 26% from £358 to £266 (1995 prices converted using the GDP deflator). The fall in real spend per capita is however much greater for books and periodicals. The real spend on books per capita (at 1995 prices, converted using the LISU academic book price index) falls from £61.55 to £28.54, that is by 54%. The real spend on serials per capita (at 1995 prices converted using Blackwell's Periodicals Price Index) falls from £125.60 to £50.20, that is by 60%.

"New" university libraries are in a similar situation. For the average new university library, the user population has risen from 9,338 to 19,195, that is by 106%. The number served by each member of professional library staff has risen from 406 to 670, that is by 65%.

Using the same deflators as for "old" universities, absolute expenditure has declined by 3% from £152.36 to £147.28; the real book spend by 21% from £27.68 to £21.88; the real periodicals spend by 49% from £40.57 to £20.52 (all figures per capita).

Over the period, both parts of the UK higher education sector have therefore experienced:

a) large increases in student numbers;
b) large increases in users per member of staff;
c) decreases approaching 60% in real spend per capita on books and serials.

1.3 Higher education: the future

The year 1997 will be remembered as the Year of the Reports in the library profession in the United Kingdom. A number of far-reaching Government policy documents was published, affecting all library sectors covered by our study. In the higher education sector, the long awaited Dearing report [3] did much to raise the profile of cross-sectoral collaboration. It set out a framework for co-operation between higher and further education as well as public sector libraries, which embraced the expansion of new technologies, transfer of expertise and lifelong learning. Also in higher education, the Pilot Site Licence Initiative (PSLI) evaluation studies [4] paved the way for the establishment of networked electronic information resources as an integral part of the academic library portfolio. Dearing's message was heralded by the Kennedy [5] and Higginson [6] reports, which addressed further education provision through learning technology and widening participation for non-traditional students.

While the future may not hold in the UK an increase in student numbers to match that of the last 15 years, the environment will change and demands increase. Pressure on library budgets will continue.

Students are contributing more to their own maintenance and to fees, either through loans, earnings or savings; there is little incentive to spend on books.

New technology is welcome, and offers opportunities for new services and alternative methods of delivery. But only in relatively few places does the digital form offer a direct replacement for the hard copy; even then it puts increased pressure on capital budgets. Innovation also necessitates additional staff training and user education.

Teaching methods have changed and the trend to resource-based, that is library-intensive, learning will continue. The proportion of non-traditional students (e.g. part-timers, distance learners) will continue to increase: indeed it has been argued that, since as many as 80% of full-time students may have part-time jobs, the full-time student is in fact a rarity. Such non-traditional students require more support and longer library opening hours.

1.4 The wider context

In the past year, a number of other reports have signaled high-level changes in public policy, with important implications for the future of libraries. Government green and white papers on a more responsive National Health Service raised the profile of health libraries, as did the revamping of nursing education and the establishment of regional health libraries groups around the country. Public libraries however received the most attention, beginning with the then Department of National Heritage's Reading the Future report [7], followed by the Library and Information Commission's New Library: the People's Network [8], the National Audit Office's Due for Renewal [9], the Department of Culture, Museums and Sport's National Grid for Learning [10], and since January the Government's white paper on lifelong learning [11] and their positive response to the People's Network report [12]. All have served to secure the future role of public libraries by placing them firmly in the centre of a developing national information infrastructure supporting lifelong education and information delivery and much more besides. In Scotland and Wales, successful devolution initiatives look set to alter substantially their regional government framework, thus affecting library services.

It therefore seems certain that the library landscape will change dramatically over the coming years, and that this change will be driven by cultural and political factors as much as by technology.

1.5 Higher education imperatives

This analysis of the financial and cultural context in which higher education libraries operate exposes a number of management imperatives:

a) Target Staff Resources
It is a cliché to see staff as the most valuable resource of an organisation. Nevertheless, in the modern library we gain most from customer care, or front-of-house operations, from liaison with our academic staff and from technical innovation. The background operations, for instance of acquiring and processing books and serials, are necessary to our efficient functioning, but not the highest priority for a scarce and valuable resource.

b) Gain Value for Money
In this competitive market place, with suppliers chasing library purses that are shrinking in real terms, the customer can demand the lowest prices combined with a high-quality service. However, just like manufacturing industry, we also require stable long-term relationships with suppliers, whom increasingly we regard as partners in our operations.

c) Exploit New Communications Technology
Much ink has been expended on the importance of new technologies for the delivery of teaching. At a more mundane level, we should not underestimate the potential of electronic communication with our users (e.g. electronic capture of inter-library loan requests or book suggestions) and our suppliers (e.g. EDI, uploading check-in data from serials agents). Real efficiency gains are possible, by shaking time, paper and duplication out of the acquisitions process.

d) Precipitate the Electronic Publishing Revolution
We are still waiting for the full benefits of the electronic publishing revolution. Our users know what is possible. Frustratingly we are not yet in a position to deliver it to them, largely because the electronic corpus does not yet exist.

e) Enter Strategic Partnerships
Individual libraries alone cannot achieve imperatives (b-d). Indeed, pace eLib, the higher education sector probably cannot in isolation create and exploit new technologies. It is only through co-operation and partnership, with other elements of the higher education sector, with libraries in other sectors, and with suppliers and producers, that we can hope to radically alter the market place.

It is evident that the collaboration represented by purchasing consortia has a potentially vital role to play in the future.

2. Purchasing consortia

The figures in 1.1 above illustrate the potential for savings in the main sectors. While agents' discounts on serials are low and apparently in further decline, the demise of the Net Book Agreement (NBA) provided an obvious opportunity to use the power of consortium purchasing to gain discounts from the generous margins on books. Our initial investigation of existing purchasing consortia suggests two interesting, if not entirely unexpected, hypotheses:

a) Library purchasing consortia tend to function as part of larger established general consortia. This implies that such consortia tend to be both single-sector and concentrated in sectors with well established co-operative or hierarchical structures.
One notable exception is the Wessex Libraries Purchasing Consortium. This is an independent consortium, set up following the demise of the NBA for the sole purpose of library purchasing. It is avowedly cross-sectoral, with members drawn from higher education, further education, the Health Service and the private sector.[13]

b) Partly because of the nature of libraries, the consortia tend to be fairly laissez-faire. There is no central buying, warehousing or distribution. Members are expected, rather than contractually required, to purchase from the agreed suppliers.

3. The Southern Universities Purchasing Consortium

3.1 Background

Higher education purchasing in the UK exemplifies the model outlined Section 2 above: a regional network of seven consortia is well established. These consortia are:

- Higher Education Purchasing Consortium Wales
- Joint Consultative and Advisory Committee on Purchasing (covering Scotland and Northern Ireland)
- London Universities Purchasing Consortium
- Midlands Universities Purchasing Consortium
- North East Universities Purchasing Group
- North Western Purchasing Consortium
- Southern Universities Purchasing Consortium (SUPC)

Earlier years saw an emphasis on non-library high-spend areas, e.g. catering, stationery, IT. However as market conditions changed, particularly with the demise of NBA, the consortium infrastructure was already in place to take advantage.

We shall examine in some detail the operation of the Southern Universities Purchasing Consortium. Please note that the views expressed here are those of the authors, not necessarily of the SUPC.

Founded in 1974, the SUPC is a mature and flourishing organisation, open to institutions in receipt of Higher Education Funding Council for England (HEFCE) funding. At the time of writing there are 30 full members, and seven associate members. Despite the size it is very focused; only HEIs, chiefly

universities, are members.

One important characteristic is that parent institutions, not libraries, are members. There is generally commitment to the SUPC at the highest level within these institutions; other bodies, such as funding agencies and auditors, are aware of its activities. There is therefore institutional and sectoral expectation that full use will be made of SUPC-negotiated agreements.

The SUPC is generally regarded as one of the more successful consortia. This success arises partly from its size: on published statistics, the members have a combined spending power approaching £1bn. It also derives from the level of activity, seeded by a full-time professional Regional Purchasing Co-ordinator and two Assistants, aided by increasing numbers of purchasing professionals in individual HEIs.

3.2 Aims and Objectives

Of the aims and objectives of the SUPC, we would highlight the following:

a) "the negotiation of special discounts on a group basis";
b) "to secure the advantages of group purchasing";
c) "raising the purchasing profile at all levels";
d) "seeking and developing strategic alliances".

Using the muscle offered by group purchasing is a fairly obvious aim. However, it must be borne in mind that the SUPC is a combination formed by very different, completely autonomous HEIs. There is little scope or indeed infrastructure for centralised purchasing and distribution.

One of the most important aspects of SUPC activity is raising the level of purchasing professionalism. This is achieved partly by example, partly by involving other professions through the project-group structure, but also by education and training.

As we noted earlier, the formation of strategic alliances with other consortia and public organisations is an important means of managing the purchasing environment.

3.3 Obligations

Membership of a consortium of course brings obligations as well as benefits. Members are expected to keep confidential information such as the terms of SUPC agreements, and also to abide by the ethical code of the Institute of Purchasing and Supply.

But the most important obligation is active participation in consortium agreements. If members do not use the agreements, a consortium will fail. Libraries in particular have in the past had fairly comfortable relationships with suppliers. In the UK this was due in part no doubt to the existence of the NBA, which created an environment of fixed prices, thus exacerbating a general reluctance on the part of librarians to negotiate.

3.4 The Libraries Project Group

The SUPC's activities are structured in a number of Commodity Areas: Building and Site Services; Catering; Computing; Furniture and Related Equipment; Printing, Stationery and Office Equipment; Professional Services; Scientific Equipment and Laboratory Supplies. Each Commodity Area is then further structured into a number of Project Groups.

Practically all areas of HEI activity are covered. This breadth of scope demonstrates the importance of the partnership between purchasing professionals and professionals working in individual commodity areas.

Even within one project group, such as Libraries, the number of members gives rise to a wide variation in the requirements of any agreement. The SUPC will therefore typically negotiate with one or more

suppliers a framework agreement, which will satisfy the majority of expressed needs of members. Individual libraries are then able, within the overall framework, to customise the agreement to their individual needs. Such agreements therefore have both universal and bilateral characteristics.

The SUPC has major agreements in place both for serials, and for monographs and standing orders. The latter agreement is the more complex, and demonstrates the potential of consortium purchasing for securing substantial discounts.

3.4.1 The Serials Agreement

From its inception over 20 years ago, SUPC had an informal arrangement with a subscription agent. This arrangement offered a retrospective rebate based on total SUPC spend, together with settlement discounts for advance payment of invoices. Journal prices were based on the agent's list price; in many instances this price is higher than the publisher's list price as it includes a handling charge. About 80% of SUPC members' serials requirements were purchased through this arrangement.

In March 1995, the SUPC recognised the need to tender formally this arrangement. The tendering process was carried out in accordance with the European Purchasing Directives. Potential suppliers were visited to assess their service capabilities. Financial assessments were also undertaken; these were of particular importance because of the practice of paying for serials in advance.

The tender was based on: discount, or handling charge, on the publisher's list price; settlement discounts for advance payment of invoices; and retrospective discounts based on total Consortium expenditure. This pricing structure enabled easy comparison of the bids on a like-for-like basis, since there were no precise lists of journals purchased on which to base the evaluation. Prices for consolidation services were also sought. Consolidation services are particularly advantageous for North American journals. Members could decide on the consolidation services required and payment profile to suit their individual requirements. The evaluation took into account the cost of transfer of subscriptions.

The contract was awarded to two agents and members were free to choose whichever agent they wished. The exercise realised savings, releasing additional funds for members' diminishing budgets. In percentage terms these savings were relatively small: agents themselves operate on small margins.

3.4.3 The Monographs and Standing Orders Agreement

Potentially 33 libraries could participate in the agreement. This number would obviously be attractive to suppliers, representing a significant slice of the academic market. It therefore gave the negotiators a good bargaining position.

But the number also posed problems of diversity. Member libraries buy all kinds of materials, including grey literature and standing orders, on the widest range of subjects, from all possible markets (UK, EU, US, etc.). They also have very diverse requirements for servicing, invoicing etc.

Before inviting suppliers to tender, a survey of the membership was undertaken to determine the likely spend, existing suppliers, and requirements for servicing.

The tender process itself aimed essentially for transparency of pricing, to eliminate the cross-subsidy of a wide range of servicing that operated under the NBA. Suppliers were therefore invited to tender:

- on the basis of discount from the publisher's list price;
- for one or more of four markets: UK, Rest of Europe, North America, Rest of the World;
- quoting itemised individual servicing costs.

Prices were required for: covering paperbacks; strengthening books; jacketing hardbacks; ownership stamping; affixing barcodes, bookplates, security tags, date and spine labels; and for supplying cataloguing. Members would therefore be able to pick and mix on the basis of true servicing costs within an overall headline discount.

The suppliers who elected to tender were subject to routine financial checks. Those who could supply members' needs were then visited by representatives of the working group. These visits typically lasted several hours and were crucial to the selection process: they enabled the working group to get a real feel for the company, and particularly for its systems and quality procedures.

Those suppliers clearing all the hurdles were finally invited to meet the working group to provide a final clarification of their bids. The purpose of these meetings was to ensure that suppliers understood the basis on which the Consortium was working, namely the transparency of pricing mentioned above, and were structuring their bids appropriately.

Following this stage a final evaluation of the bids was undertaken, and a recommendation put to a meeting of the Libraries Project Group. The outcome was that one supplier was accepted for the UK market, and a second for all the other three markets. Discounts of course varied from market to market, but were by any measure substantial.

3.4.4 Lessons

A number of lessons can be drawn from the operation of the agreements outlined above.

Firstly, members are concerned to achieve both high discounts and quality of service. If service is poor, the result is aggravation for all and low take-up of the agreements.

Secondly, active management, not only of the tender process, but also of the contracts awarded, is essential to ensure that: a) the most appropriate suppliers are chosen; b) quality of service is set, maintained and improved.

Thirdly, a partnership between purchasing and library professionals is most advantageous. This enables the pooling of expertise and knowledge: negotiation, contract management and procurement regulations are not necessarily areas where librarians have strong skills and experience.

Finally, consortium members like a choice. Human relations do play a part; some librarians may not wish to deal with a particular supplier. A large element of competition is also healthy. However, for such competition to be effective, the terms (particularly the discounts) offered by the agreed suppliers must not differ too widely.

4. Benefits of Consortium Membership

We identify four major benefits arising from consortium membership; the second is probably the most significant in the long term.

Firstly and most obviously, there are financial savings. Discount rates vary from the headline-grabbing percentage on UK monographs to much smaller rates on serials. In many universities' budgets however, small percentages on serials are significant in terms of actual money saved.

Secondly, we believe that the SUPC, and the other consortia active in the library sector, have radically affected the marketplace. Suppliers now realise that libraries will band together and, more importantly, will demonstrate their commitment to such associations by moving their business to recommended suppliers. Libraries now also require real transparency of pricing: it is their only means of taking informed decisions on the disposition of scarce resources.

Thirdly, librarians themselves are becoming much more aware of the procurement process, of market dynamics and of the power of group purchasing. Nearly all library staff are to a greater or lesser extent involved in the purchasing process. We all send messages, conscious or unconscious to our suppliers. It is the duty of those of us most closely involved to ensure that this awareness is increased.

Finally, consortia have increased the level of co-operation and partnership between libraries; they have

brought into being new partnerships between libraries and purchasing professionals; and they are opening the door to new possibilities of partnership with other strategic players and with the suppliers themselves.

5. The Future Role of Purchasing Consortia

5.1 The supply chain

Obviously all active consortia have a full agenda: they have current agreements to manage, expiring agreements that will generate a new round of tendering, and new areas for tender. But in addition to these bread-and-butter operations, there are a number of areas of activity in which we foresee consortia playing a significant role.

In order to establish likely areas of future operation, let us first examine the costs of making materials available to our users. In a much simplified model, these costs may be broken down as follows:

- Library's costs
- Supplier/intermediary's costs
- Supplier/intermediary's profit
- Publisher's costs
- Publisher's profit

Generally consortia discounts have come from intermediaries' costs and profits. There is more to be gained here across the sectors, but our attention needs to be directed to the entire supply chain.

5.2 The regional library

Our experience of working with single and multi-sectoral consortia has demonstrated that they are able to satisfy the requirements of very diverse libraries. This ability leads us to believe that regional library collaboration is a viable means of reducing libraries' costs. Our analysis of the political context in 1.4 above indicates that the regional dimension will have increasing importance for libraries.

The model in Figure 1 shows separate autonomous idiosyncratic library services across four sectors. The services of these libraries are tailored to the needs of very different groups of users, but they are supported by pooled common background functions: acquisitions, cataloguing, library system. These functions are contracted out to a separate agency, and the individual libraries are free to concentrate on their core service to users.

There is the benefit of a ring main of shared information: a union catalogue, a union borrower database.

There should also be economies of scale arising from this pooling. These will reduce the costs of individual libraries. There may also be additional economies from cutting suppliers' costs, who may be dealing with fewer agencies. There may also be scope for dealing directly with the major publishers, thus in some cases eliminating suppliers' costs and profits

5.2 Electronic media

The area not so far tackled is the profits and costs of publishers. Many librarians, and indeed vice-chancellors, share the feeling that this is the area most deserving of attention, but one difficult to affect directly because of the buffer of suppliers.

In the UK current interest centres on the National Electronic Site Licence Initiative (NESLI). This grew from an analysis of an initiative begun in 1995 by the Higher Education Funding Council for England, on behalf of the other UK funding bodies, called the Pilot Site Licence Initiative (PSLI). The aim of PSLI was: "...to test whether the site licence concept can deliver material widely to the academic community, whether it can allow more flexibility in the use of material, whether the concept can adapt to a variety of formats, to test legal arrangements and, finally to explore whether increased value for money

can be achieved." [14]

It is interesting to note that the initial accent of PSLI was on hard copy; electronic access was to an extent a by-product. [15] Now the Joint Information Systems Committee (JISC) has taken on responsibility for developing the successor electronic service, NESLI, with the aim of providing ?access to a wide range of full-text journals across the network. [16] This will be achieved by a managing agent, appointed by the JISC to provide the following service: "manage delivery of the electronic material, undertake negotiations with publishers and oversee the day-to-day operation of the programme to ensure that it provides value for money through cost effective operation." [17] At the end of April 1998, it was announced that this function of a managing agent is to be filled by the serials agent Swets & Zeitlinger in partnership with Manchester Computing (University of Manchester).

This is a welcome development. Swets is well placed to pursue the international dimension, recognised as important by the JISC and the academic community. Manchester Computing is widely respected as the host of datasets such through MIDAS.

It is very early to pass judgment, but some concerns do arise from our experience of purchasing consortia.

The first is the lack of competition. There seems initially to be no choice of supplier or interface for HEIs. This is of course to an extent an operational matter and may be rectified in time. But more importantly, there is the question of the long-term implications for the market. What will be the effect of one of the four main serials agents having a near monopoly on the supply of core electronic journals to the academic community?

The second concern is the relationship between the serials agent and the publishers; this applies to any agent, not particularly to Swets. All the agents are in a very delicate and difficult position. They depend for their livelihood on the discounts from publishers; therefore they do not have a strong negotiating position vis-à-vis the publishers. Some unkind librarians see them as agents of the publishers, rather than agents of their customers.

An arrangement ensuring competition and choice, and providing a strong independent negotiating buffer may be preferable.

Notes

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14. Report on Phase 1 of the Evaluation of the UK Pilot Site Licence Initiative, p.4

15. Ibid. Foreword from the funding bodies.

16. Joint Information Systems Committee. Five Year Strategy: 1997 Review. Nottingham: Joint Information Systems Committee, 1997. p28

17. Swets & Zeitlinger press release, May 1998.

ABBREVIATIONS

HEFCE	Higher Education Funding Council for England
HEI	Higher education institution
HESA	Higher Education Statistics Agency
IT	Information technology
LISU	Library and Information Statistics Unit, Loughborough University
NBA	Net Book Agreement
NESLI	National Electronic Site Licence Initiative
PSLI	Pilot Site Licence Initiative
SCONUL	Standing Conference of National and University Libraries
SUPC	Southern Universities Purchasing Consortium

Back to contents

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